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guarantor records

With the versatility of MediMAX's database structure, guarantors and patients exist independently from each other. A guarantor may be responsible for more than one patient and likewise a patient may have more than one guarantor. Each guarantor you do business with needs a guarantor record established in your MediMAX database.

To create a new guarantor record, choose File→New→Guarantor.

The New Guarantor dialog box displays for you to select the type of guarantor record you want to create. There are five types of guarantors: Individual, Employer, Attorney, Carrier, and Institution. Select the type of guarantor record you want to create by clicking the appropriate choice.

Most guarantors are individual guarantors, such as a patient who is the guarantor, or a patient whose mother or father is the guarantor. Once you have made your choice, click Create.

Choose the type of guarantor you wish to create . . .

. . . and click the Create button.

You can also create a new guarantor record by clicking the Add button in the Guarantor view of the Patient window. The Guarantor Search displays. Click the New button to display the New Guarantor dialog box.

Click New in the Guarantor Search window to create a new guarantor record.

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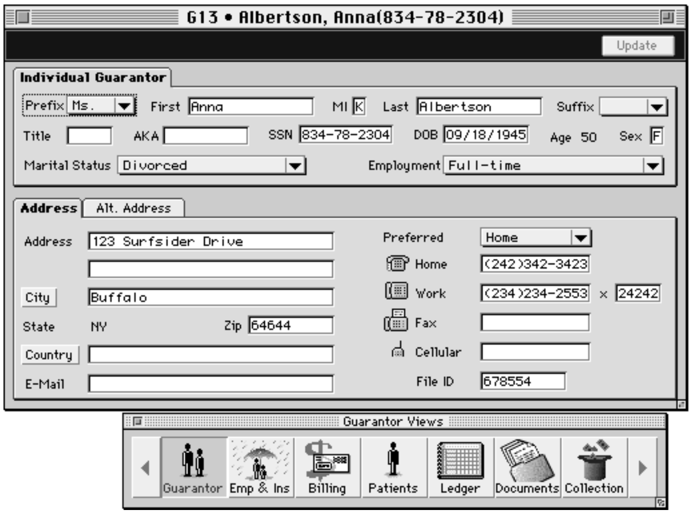
the guarantor view

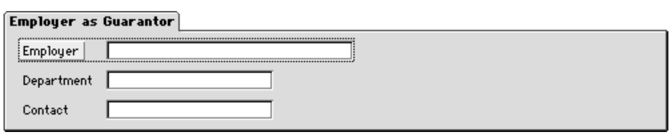


A new Guarantor window opens for you to enter information for the guarantor. If you choose Individual as the guarantor type, the Guarantor window opens with the Individual Guarantor tab at the top, and two tabs, the Address tab and the Alternate Address tab, at the bottom.

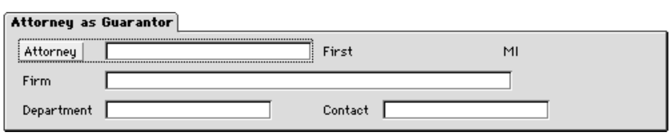
If you choose any of the other guarantor types, the Guarantor window looks the same as if you choose an individual guarantor, except there is only one tab at the bottom of the window, the Address tab.

If the guarantor is an individual guarantor, enter the basic information for the guarantor such as name, date of birth, and sex, in the Individual Guarantor tab at the top of the Guarantor window.

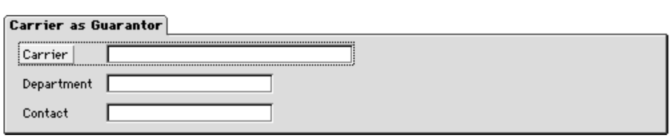
You can customize the items in the Prefix and Suffix pop-up menus, if you wish. For information on customizing pop-up menu items, refer to Chapter One, “MediMAX Basics.”



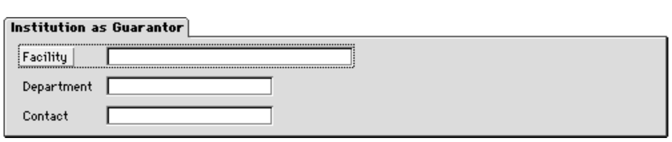
If the guarantor is an employer, enter the basic employer information in the Employer as Guarantor tab at the top of the Guarantor window. Click the Employer lookup to open the Employers reference, where you can select an employer from your list of employers, or enter a new employer.



If the guarantor is an attorney, enter the basic information for the attorney in the Attorney as Guarantor tab at the top of the Guarantor window. Click the Attorney lookup to open the Attorney’s reference, where you can select an attorney from the list or create a new entry.

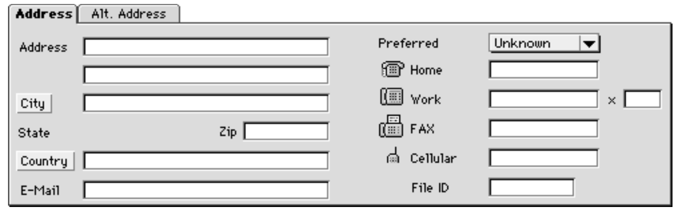


If the guarantor is an insurance carrier, enter the basic carrier information in the Carrier as Guarantor tab at the top of the Guarantor window. Click the Carrier lookup to open the Insurance Carriers reference, where you can select a carrier from your list or create a new en

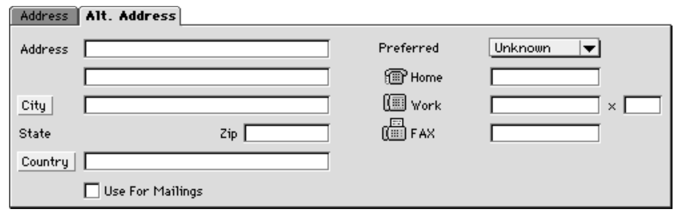


If the guarantor is an institution, such as an orphanage or penal facility, enter the basic information for the institution in the Institution as Guarantor tab at the top of the Guarantor window. Click the Facility lookup to select a facility from your list or create a new entry.

In the Address tab at the bottom of the Guarantor window, enter the address information for the guarantor. The address information may have automatically filled in when you selected the guarantor from your database.

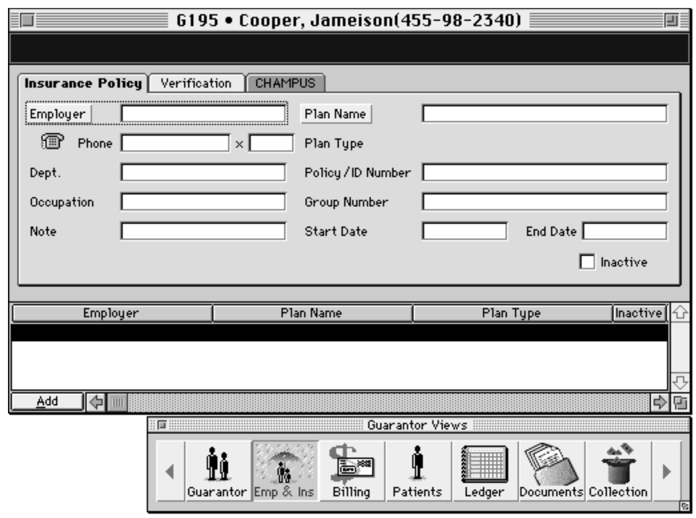


In the Alternate Address tab (individual guarantors only), enter the alternate address, if any, for the guarantor. For example, a guarantor who is a college student or seasonal resident may use an alternate address. Click the Use for Mailings checkbox if all correspondence with the guarantor, including statements, should go to the alternate address.



the employer & insurance view

Click the Emp & Ins icon on the Guarantor Views palette. The Guarantor window displays the Employer & Insurance view for entering and tracking employer and insurance information for the guarantor.



At the top of the Employer & Insurance view are three tabs: the Insurance Policy tab, the Verification tab, and the CHAMPUS tab.

At the bottom of the Employer & Insurance view is a list of employers and insurance plans for the guarantor. Click the Add button to add an employer and an insurance plan to the list.

When you click the Add button, the fields in the Insurance Policy tab become active for you to fill in the information for the insurance plan you are adding.

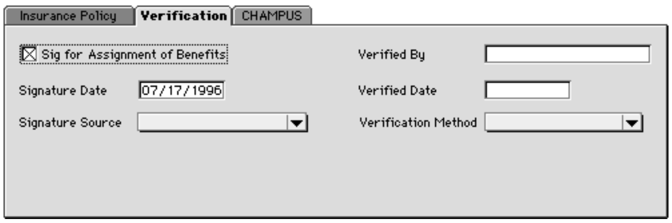
Click the Employer lookup to open the Employers reference and select the guarantor's employer. If the selected employer has only one insurance plan associated with it, the Plan Name, Type, and Policy Holder information automatically fill in. If more than one plan is associated with the employer, a QuickSearch dialog box displays the list of the employer's plans. Continue to fill in the remaining fields of the Insurance Policy tab.

Select the Inactive checkbox to indicate that the employer or policy is currently inactive for the guarantor.

If the guarantor has an employer but no insurance, click the Employer lookup to select the employer. If insurance information automatically fills in the other fields, delete the information from the fields.

If the guarantor has insurance but no employer, click the Plan Name lookup to select the guarantor's insurance plan and leave the Employer field blank.

If the guarantor's employer and insurance plan are not associated with one another, click the Add button and then the Employer lookup to select the guarantor's employer. Click the Add button again and use the Plan Name lookup to choose the guarantor's insurance plan. The guarantor's employer and insurance plan appear on separate lines in the list.

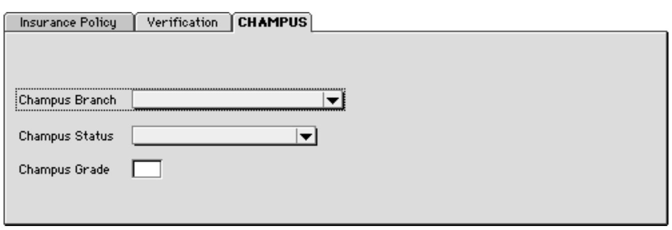


Click the Verification tab to display the verification information for this guarantor.

Click the checkbox labeled "Sig for Assignment of Benefits" if the guarantor approves assignment of benefits to the provider.

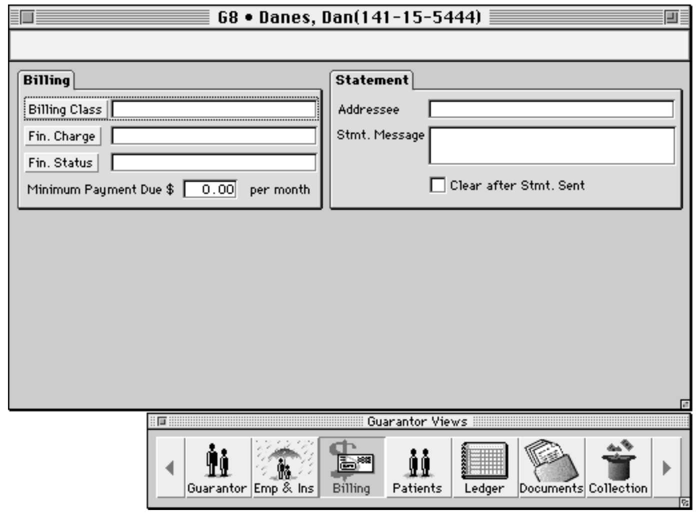
If checked, "Sig for Assignment of Benefits" prints in box 13 of the HCFA form when a new charge is posted for one of the guarantor's patients. If unchecked, "Sig for Assignment of Benefits" doesn't print in box 13 unless "Participate/Accept Assignment" is checked in the Provider IDs tab of the Insurance Plan window for the provider performing the procedure. For more information on using the Insurance Plan window, refer to Chapter Seven, "Insurance Plan Records."

Enter the appropriate information in the other fields of the Verification tab, such as Signature Date and Signature Source. Type the name of the person who verified the signature in the Verified By field and enter the date of verification in the Verification Date field. You can record the Verification Method by clicking the pop-up menu and selecting either Electronic, Fax, Insurance Card, Mail, Phone, or Other.



Click the CHAMPUS tab to view the CHAMPUS information for the guarantor, if applicable. You can record the CHAMPUS Branch, Status, and Grade.

the billing view



Click the Billing icon on the Guarantor Views palette. The Billing view displays. Enter the billing information for the guarantor.

The Billing view contains two tabs for keeping track of the guarantor's billing information.

In the Billing tab, click the Billing Class lookup to select a billing class for the guarantor. Click the Finance Charge lookup to select a default finance charge for the guarantor if different from the system-wide default finance charge you have specified in the Finance Charges reference. For more information on setting up finance charges, refer to Chapter Four, "References."

Click the Fin. Status lookup to specify the guarantor's financial status. If the guarantor is on a payment plan, enter the monthly minimum payment amount in the Minimum Payment Due field. Statements are then printed for the minimum amount due, rather than for the full outstanding balance.

If you enter an amount in the Minimum Payment Due field, the amount displays on the Chronological tab of the guarantor's Ledger view each time you run statements with the Statement Generator. The amount also prints on the guarantor's statement as the payment amount due.

If the guarantor's balance is less than the amount in the Minimum Payment Due field, no statement is printed for the guarantor.

In the Statement tab, enter information you want to print on the guarantor's statement. If the name of the addressee differs from the name entered in the Guarantor view, enter the name in the Addressee field exactly how it should print on statements. If you want to print a personal message on the guarantor's statement, such as *Happy Birthday* or *Your deductible has been met*, enter the message in the Stmt. Message field. Selecting the checkbox labeled "Clear after Stmt. Sent" will clear the Stmt Message field after the next statement is printed.

Note: Any data entered in the Addressee field will be printed on the guarantor's statement. For example, if you accidentally enter a space character in the Addressee field, the guarantor's statement will print with the Name field blank.

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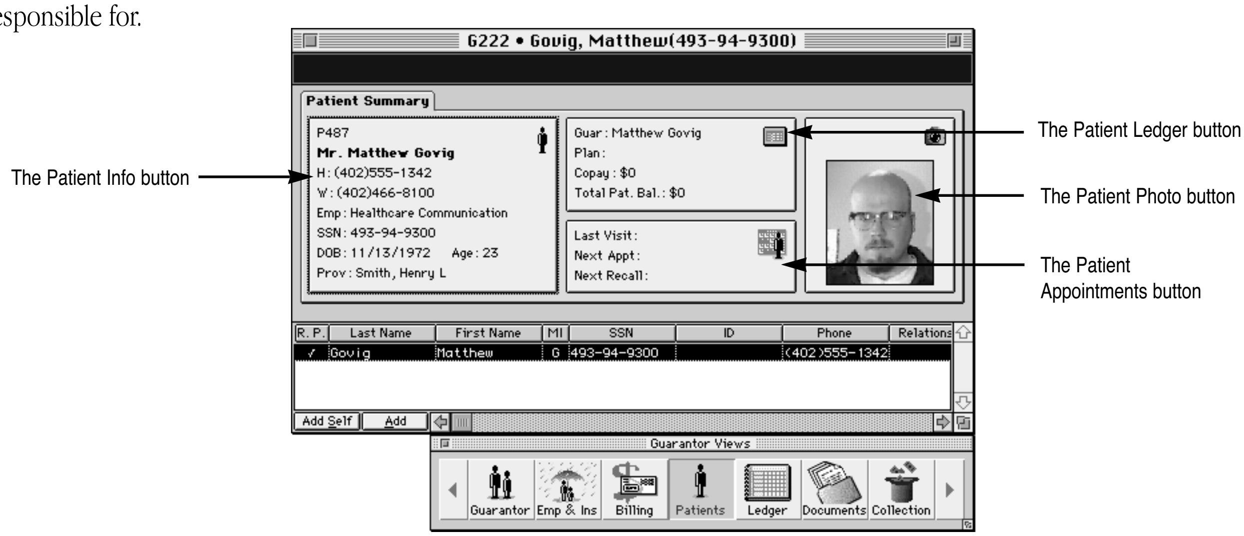
the patients view

Click the Patients icon on the Guarantor Views palette. The Patients view lists all of the patients the guarantor is responsible for.



The Patient Summary tab looks and functions just like the Patient Summary window. Highlight a patient's name in the list and the patient's summary information displays in the Patient Summary tab. Click the Patient Info button to display the Patient view for the selected patient. Click the Patient Ledger button to display the patient's Ledger view. Click the Patient Appointments button to display the patient's Appointment view (or Recall view if you haven't purchased the Scheduling option). Click the Patient Photo button to display the Miscellaneous tab of the Patient view.

Click the Add Self button to add the guarantor as a patient. The Add Self dialog box displays. Select a Provider and a Location and click OK. A new Patient window displays with the guarantor's information already filled in. A Provider and Location must be selected in the Add Self dialog box because this information is necessary in order to save a Patient record.

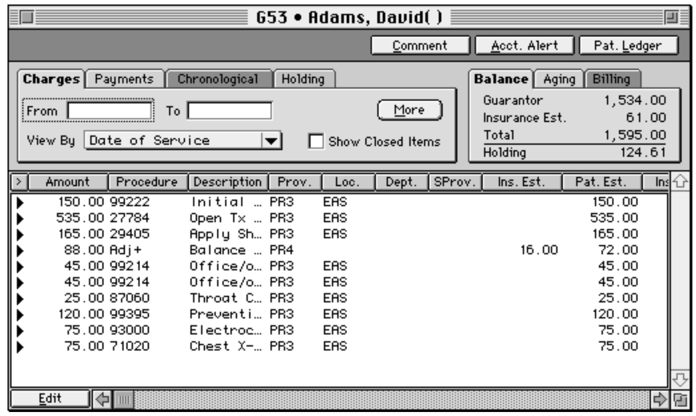
Click the Add button to add a patient to the list of patients for the guarantor. The Patient Search displays. Select a patient to add to the list or click New to create a new patient record.

If you want to add a member of the guarantor's family as a patient, hold the Option key while clicking the Add button. A new Patient window displays with the guarantor's last name, address, and other information that is likely to be the same for both the patient and guarantor already filled in. Now simply enter the patient's first name, age, sex and other unique information. For more information on the Patient window, refer to Chapter Five, "Patient Records."

guarantor records

the ledger view

The Guarantor window's Ledger view lists all transactions associated with the guarantor's record and shows the guarantor's balance, aging, and billing information.



Viewing Items in the Ledger

With the four tabs in the upper-left corner of the Ledger view you can perform a search for specific types of transactions, if you wish to do so. Click the tab that corresponds with the type of transactions you wish to search for. Use the Charges tab to search only for charges and positive adjustments, or the Payments tab to search for payments and negative adjustments.

The Chronological tab displays all charges, positive adjustments, payments, negative adjustments, comments, claims, and statement sent items in order by date.

The Holding tab displays items the guarantor has in Holding, such as undistributed payments, pre-payments, overpayments, or balance forward items (if the guarantor had a credit balance).

Enter dates in the From and To fields to search for transactions posted within a specific date range. In the View By field, select an order by which you want to view the transactions. Select the Show Closed Items checkbox to search for all items, including those which are closed. When you have set the criteria for your search, click the Find button. The transactions that fit the search criteria you defined are displayed in the list.

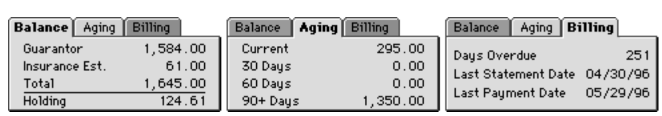
After performing a search with the Charges tab, click the arrow on the left side of any line in the list to view detailed history items associated with the charge or positive adjustment, such as distribution amounts and comments.

After performing a search with the Payments tab, click the arrow on the left side of any line in the list to view detailed history items associated with the payment or negative adjustment, such as charges, positive adjustments, and comments.

After performing a search with the Holding tab, click the arrow on the left side of any line in the list to view detailed history items associated with the holding amount, such as charges, positive adjustments, and comments. For more information on Holding, distributing Holding amounts, and issuing refunds, refer to Chapter Fourteen, "Holding."

Highlight a transaction in the list and click the Edit button in the lower-left corner to edit the transaction's information.

To the right of the Transaction Criteria tab are three tabs: the Balance, Aging, and Billing tabs.



The Balance tab displays the guarantor's current balance information. The Aging tab displays the guarantor's current aging information. The Billing tab displays the date the most recent statement was printed, the date of the guarantor's most recent payment, and the number of days, if any, the balance is overdue (calculated from the oldest open item).

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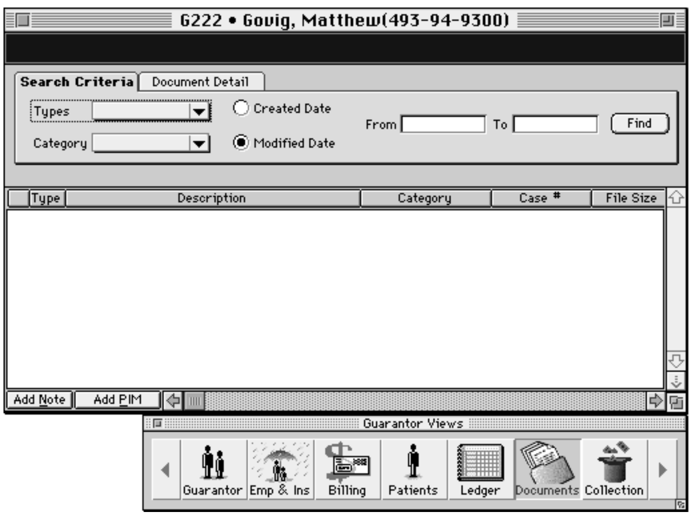
Note: If you change your system separators in the Numbers Control Panel, the guarantor's balance may appear to be incorrect. Make sure your system separators are set properly.

The action bar at the top of the Ledger view contains three buttons. Highlight a transaction in the list and click the Comment button to add a comment regarding the guarantor. The Add Comment dialog box displays. Enter the comment and click OK. The comment appears as a detailed history item in the guarantor's Ledger view.

Click the Acct. Alert button to assign an accounting alert for the guarantor. Highlight a transaction in the list and click the Pat. Ledger button to open the patient's Ledger view associated with the selected transaction.

the documents view



Click the Documents icon on the Guarantor Views palette to display the guarantor's Documents view. The Documents view displays a list of documents, such as images, notes, letters, and PIMs, associated with the guarantor.

Double-click any item in the list to open the document.

With the Search Criteria tab at the top of the Documents view you can perform a search for specific documents in the list.

With the Types pop-up menu, select the type of document you want to search for, either Images, Notes, or PIMs. Leave this pop-up menu blank to search for all types.

With the Categories pop-up menu, select the categories you want to include in the search. Categories are user-definable. For example, you might create a category called *Thank-you notes* to differentiate between this and other types of notes. The categories you create appear in the pop-up menu, as well as the choice No Category, which lists all documents that are not assigned a category. Leave this pop-up menu blank to disregard categories in the search.

Click the Created Date or Modified Date radio button to perform a search based on either the documents' created or modified dates. Enter a date range in the From and To fields to perform a search for documents created or modified within a specified date range. Leave these fields blank to disregard dates in the search.

When you have entered all the criteria upon which you want to base the search, click Find. The search is executed and the documents that match your search criteria are listed.

The Document Detail tab allows you to change the detail information, such as Description, Category and Case #, of any item you select in the list if the privilege has been set up for you in the Users reference.

Enter the changes you wish to make and click Change. A dialog box displays to verify that you're sure you want to make the change. Click OK if you are sure or Cancel if you've changed your mind.

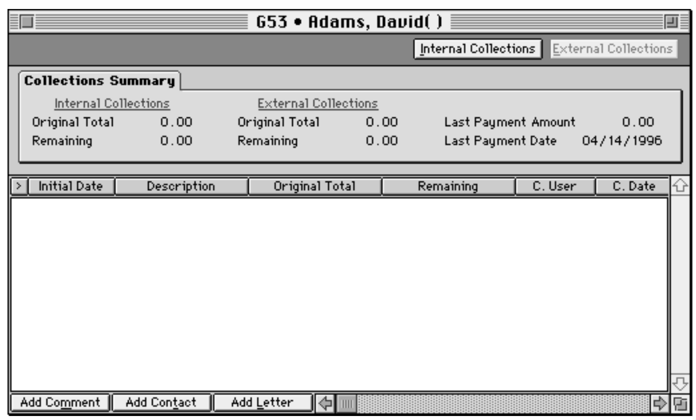
Click the Add Note button to add a note for the guarantor. The Note application displays for you to add a note that will be saved as an item in the guarantor's Documents view. For more information on creating Notes, refer to Chapter Nineteen, "Notes."

Click the Add PIM button to add a spreadsheet for the guarantor. The PIM displays for you to add a spreadsheet that will be saved as an item in the guarantor's Documents view. For more information on using the PIM, refer to Chapter Twenty, "Patient Information Matrix."

Highlight any item in the list and click Remove to delete it. A dialog box displays to verify that you're sure you want to remove the item. Click OK if you are sure or Cancel if you've changed your mind.

the collection view

This section details the basic features of the Guarantor window's Collection view. For information on sending a guarantor to Collections and managing a guarantor's collection amount, refer to Chapter Fifteen, "Collections."



Click the Collection icon on the Guarantor Views palette to display the Collection view of the Guarantor window.

The action bar of the Collection view contains two buttons, the Internal and External Collections buttons.

The Collections Summary tab displays the total dollar amounts in collections, the remaining amounts to be paid, the amount of the last payment applied toward the collections amount, and the date of payment.

Items in Collections are displayed in the list. Click the arrow to the left of any item in the list to display the collection history of the item, such as reminders you have sent the guarantor and payments the guarantor has made. The detailed history of a collection item is displayed in columns directly below the item in the list. These columns are not modifiable.

Click one of the Add buttons in the bottom-left corner of the Guarantor's Collection View to add a detailed history item to any collections item in the list.

For more information on collections, refer to Chapter Fifteen, "Collections."

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opening and updating a guarantor record

Choose Guarantor Search from the Search icon to display the Guarantor Search window.

To open a guarantor record, choose Guarantor Search from the Search icon on the left side of the tool bar.

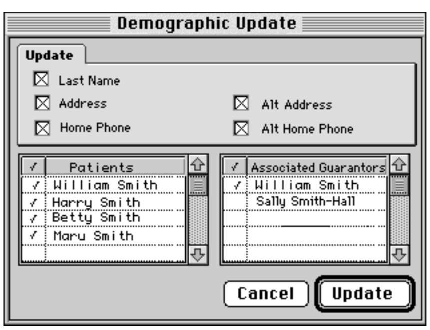
The Guarantor Search displays where you can search for the guarantor whose record you want to open. Refer to Chapter Three, “Searching,” for complete instructions on searching. Highlight the name of the guarantor whose record you want to open and click the Open button. The Guarantor window opens to the Guarantor view.

Once you have opened a guarantor’s record, the Guarantor window is identical to the new Guarantor window. You can edit the information in any of the fields. When you close the Guarantor window, a dialog box asks if you want to save the changes you made. Click the Save button to save changes, the Don’t Save button to close the Guarantor window without saving changes, or the Cancel button to return to the Guarantor window without saving changes.

The Update button on the action bar of the Guarantor view offers a way of updating the information for the patients who belong to the guarantor and need the same information updated. You can also update the information for any guarantors who are linked to the patients, if applicable.

Note: The Update button is only available if you make changes to one or more of the following fields: Last Name, Address (including City, State, and Zip), Home Ph. #, Alt. Address (including City, State, and Zip), and Alt. Home Ph. #.

For example, if a guarantor changes address, the Demographic Update dialog box makes it easy for you to update the patients’ address as well as the address for the patients’ other guarantors all at once.

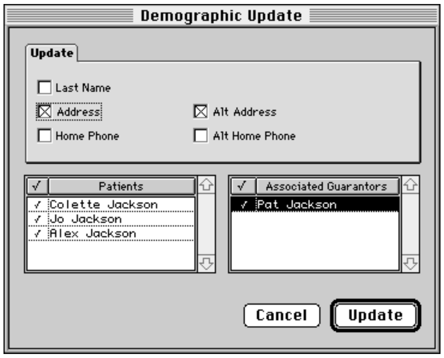


To update information, make the appropriate changes to the guarantor’s record and click the Update button on the action bar. The Demographic Update dialog box displays.

The Update tab in the Demographic Update dialog box contains checkboxes that represent the fields that may be updated for the guarantor’s linked patients and all of those patients’ linked guarantors. Click the checkbox that corresponds with the information you want to update. You may select any combination of checkboxes.

Below the Update tab are two checklists. The Patients checklist lists all patients linked to the guarantor. A checkmark automatically appears next to each patient’s name in the list. The Associated Guarantors checklist lists all guarantors linked to the listed patients. The guarantor’s names in the list are automatically unchecked. Information will be updated only to names with checkmarks.

For example, Colette Jackson and her family are moving to a new address. Open Colette's Guarantor window and enter her new address. Then click the Update button to display the Demographic Update dialog box.



Colette and her children, Jo and Alex, are listed in the Patients checklist, and their names are automatically checked. Colette's spouse, Pat, who is also linked to the children, is listed in the Associated Guarantors checklist. Pat's name is not automatically checked. Select the Address checkbox in the Update tab to indicate that the Address information should be updated. Then click Pat's name in the Guarantors checklist, indicating that the address information for Pat should be updated along with Jo and Alex. Finally, click the Update button to perform the update. The address information for the patients, Colette, Jo, and Alex, and for the associated guarantor, Pat, is updated in each of their records.

duplicating a guarantor record

To duplicate a guarantor's record, open the Guarantor window of the guarantor whose record you want to duplicate and choose File→Duplicate. A new Guarantor window displays with the following information duplicated:

Guar view	
Guar Info tab	Last Name
Address tab	Address, City, State, Zip, Country, Preferred, Home Ph. #
Alt. Address tab	Address, City, State, Zip, Country, Use for Mailings checkbox, Preferred, Home Ph. #
Emp/Ins View	
General tab	Billing Class

using a default guarantor record

If you've set up default guarantor records in your database, it is even easier to create new records for your guarantors. A default guarantor record makes it possible for you to create new guarantor records with much of the information automatically filled in. For example, if your office is in a town where many of the citizens work for the same employer, such as an automobile manufacturer, you can create a default guarantor record with the employer and insurance information already filled in.

To create a new guarantor record based on a default guarantor record, simply open the Guarantor Search and click the Default button. The Default Guarantors dialog box displays a list of all the default guarantor records you have created. Highlight the appropriate default record in the list and click the Select button. The New Guarantor dialog box displays. Select the appropriate guarantor type and click Create. A new Guarantor window opens with the default information already entered. Enter the remaining guarantor information and save the new guarantor record by closing the window or choosing File→Save.

Note: If you use a default guarantor record to create a non-individual guarantor record, only the Billing Class and Finance Charge fields automatically fill in. The remaining fields in the guarantor window automatically fill in according to the Employer, Attorney, Carrier, or Institution reference entry you select.

If you have used MediMAX Preferences to set up a system-wide default guarantor record, the default information automatically fills in every time you create a new guarantor record. For information on setting up a system-wide default guarantor record, refer to Chapter Two, "Preferences."